

EXIT INTERVIEW CHECKLIST**I. Opening**

- A. Introductions. Begin with the reviewer.
- B. Purpose. To (1) review the findings and recommendations contained in the delegated purchasing program review report, (2) answer questions, and (3) request payment data information.

II. Compliance Review Report Summary

- A. Departmental Purchasing Policies. Review with delegation holder and respond to questions.
- B. Departmental Purchasing Operating Procedures. Review with delegation holder and respond to questions.
- C. Conflict of Interest Statements. Review with delegation holder and respond to questions.
- D. Drug-Free Workplace Certification files. Review with delegation holder and respond to questions.
- E. Payee Data Record. Review with delegation holder and respond to questions.
- F. Delegation Program Purchase Transactions. Review with delegation holder and respond to questions.
- G. CMAS Orders. Review with delegation holder and respond to questions.
- H. Master Contract Orders (Master Agreements, Statewide Contracts, State Price Schedules). Review with delegation holder and respond to questions.
- I. CalCard Transactions. Review with delegation holder and respond to questions.

III. Closing

- A. Overall Recommendation. Explain overall recommendation, including status of delegation, and need for follow-up review, if applicable.
- B. Payment Data Forms. Request payment data information. Explain that information is collected on a representative sample of transactions selected during the review. Payment data forms are to be returned as indicated on the form.
- C. Questions.